

**Office of Acquisition Management and Financial Assistance**  
**FINAL Operating Plan for FY 2005**  
**as of February 28, 2005**  
**(updated 09/06/05)**

**Vision:** Business Brokers for Program Success.

**Mission:** Facilitate business solutions for DOC mission success.

**Values:** Collaboration, respect, learning, results-oriented

**Goals and Strategies**

**1. Customer Service**

- A. Improve overall customer satisfaction with our service.
- B. Effective Service Partnership: Increase our responsiveness, communication, and cooperation with customers.

**2. Financial**

- A. Minimize administrative costs
- B. Use purchase card to reduce administrative costs and processing time.
- C. Maximize contract cost avoidance.

**3. Internal Business Processes**

- A. Acquisition Excellence: Provide leadership and promote effective quality control.
- B. Become an implementer of innovative and successful best practices.
- C. Promoting the value of the Business Broker.

**4. Learning and Growth**

- A. Increase availability and access to information for strategic management and decision making.
- B. Prepare the workforce as business brokers who partner with customers for DOC mission success.

**Codes:** ***Italic Bold*** – Procurement Executive Sade's Priorities  
**Italic Bold Underline** - CFO/ASA Wolff's Priorities

### Customer Perspective

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
<b>Communications/Technology</b>	OAMFA Website as a Map for Case for Change <ul style="list-style-type: none"> <li>o finalize SOP for Website</li> <li>o communication vehicle for business brokers</li> <li>o standardization of content</li> <li>o update web content</li> <li>o on-going maintenance</li> </ul>	Mary Mozingo          Kevin Crowley	OAMFA Directors, OAMFA Staff, OAMFA Customers, ASI	01/31/05  on-going monthly  monthly		03/15/05	Customer Service: Improve overall customer satisfaction with our service.	% satisfied w/timeliness  more responsive
<b>Human Capital/Policy</b>	Implement and Communicate DAO 208-2	Leslie Andreacs	OMO, OGC, CFO, Acquisition Council, HCO's	<del>06/30/05</del>	09/30/05		Customer Service: Improve overall customer satisfaction with our service.	
<b>Human Capital/Policy</b>	Provide DOC Acquisition Community with relevant and timely acquisition policy and guidance	Nancy Barrere,	CAS, OGC, Acquisition Council	On-going			Customer Service: Improve overall customer satisfaction with our service.	% satisfied with quality of the work performance

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
<b>Communications</b>	Continue implementation of Business Case for Change o update Case for Change milestones (incorporate FY 05 initiatives – business process, commodity teams) o develop and implement charter for Acquisition Council's Communications Team o draft communication strategy - appropriate vehicles o finalize annual report o outreach to CIO, CFO o Acquisition and Grants Councils o outreach strategy for: - CAS - CASD - FA - CAPPS	Chris Makris  Mary Mozingo	OAMFA Directors, BPOs, Acquisition Council, Grants Council	02/28/05  05/31/05  04/30/05 monthly quarterly			Effective Service Partnership: Increase our responsiveness, communication and cooperation with customers	% customers satisfied with responsiveness, cooperation, and communication skills
<b>Human Capital/ Policy</b>	Role and use of Grants and Acquisition Councils - charters o Acquisition Council Meetings (01, 05, 06,07,08) o Grants Council Meetings (03, 06, 10)	Nancy Barrere Richard Franetzki	OAMFA Directors, BPOs, Acquisition Council, Grants Council	quarterly  quarterly				

## Financial Perspective

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
<b>Business Process</b>	<b>OAMFA's IT Governance</b>	Debra Young	OAM Directors and representatives, CIO, ASI		10/31/05			
	Internal Initiatives							
	o Implement Internal Change Control Board			03/31/05	<del>06/15/05</del>			
	o Implement External Change Control Board			03/31/05	<del>06/15/05</del>			
	o <b>CBS (CBE) Interface</b>	Tom Cochran		04/30/05		04/30/05		
	- test			02/28/05	07/31/05			
	- rollout			03/31/05	09/30/05			
	- conversion			04/15/05		04/30/05		
	- training			09/30/05	12/31/05			
	- implementation							
	o Support IT Steering Committee Initiatives	Kevin Crowley		On-going				
	o Meet regularly with Technology Team, CIO	Debra Young		On-going				
	o Assess and fix OAMFA Shared Drive (G Drive)	Mary Mozingo						
	- CAS							
	- GMD			02/28/05				
	- Management			03/31/05				
	- Admin			04/30/05				
	- CASD			05/31/05				
	- CAPPS			06/30/05				
				07/30/05				

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
<b>Technology</b>	o Develop business case for web acquisition environment DROP 6/1/05	Debra Young/Tom Cochran	OAM, CIO, CAS CAPPS, Acquisition Council, BAH	08/15/05				Cost to Spend Ratio
	o <b>Earned Value Management Reports</b> - CBS (CBE) - EARS Build II	Cochran Stern		03/30/05 monthly	monthly			
	o <b>Internal system initiatives</b> - assist CAS with the implementation of Internet interactive Business Opportunity Page (iBOP) - update security plans -- OAMFA Website -- Balanced Scorecard -- CStars -- EARS -- Workforce Assessment Data Base - update architecture diagrams	Kevin Crowley		03/31/05	06/30/05	04/19/05		
				09/30/05			Minimize Administrative Cost	
							Measure on BSC	
	o <b>CBE training and documentation</b> - assess/identify training needs - consolidate training documentation for an enterprise wide solution - C-Requisition training - Project Charter	Crystal Davis		04/31/05			-Employee Satisfaction	
				06/30/05		03/23/05	-Customer Satisfaction	
				10/01/05 10/07/05 10/01/05				
	<b>EARS/Balanced Scorecard Interface</b>							
	o implement Build 1 according to project plan o operate and maintain Build 1 o develop cost estimate for FY 05 Build 2 & define Build 2 requirements o RFP Issued o Build 2A completed	Yancey Stern		03/15/05 on-going  03/11/05 05/11/05 09/30/05	04/08/05  04/30/05	05/02/05  04/08/05 04/18/05		

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
<b>Business Process</b>	Implement the Purchase Card Process o Default and reconciliation o Review and streamline purchase order/ payment issues	Mike Anastasio /Dan Alexander	CAPPS	10/01/05			Use Purchase Card to Reduce Administrative Costs and processing Time	% of actions under \$25K using purchase card
								Ratio of rebates to purchase card transactions
<b>Human Capital/Policy</b>	Manage and improve the DOC Purchase Card Program in support of Smart Pay	Dao Vissering	Commerce Bankcard Center Acquisition Council, OFM, OAS, OIG	On-going			Maximize Contract Cost Avoidance	Cost avoidance through use of purchase card % Prompt Payment Interest paid of \$ total \$ distributed Dollars obligated as % of overall budget Purchasing costs as % of overall budget

### Internal Business Processes

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
<b>Business Process</b>	Improve the quality of the Grants program	<del>Chris Makris</del> Richard Franetzki	OGC, OIG, Grants Council				Acquisition Excellence: Provide leadership and promote effective quality control	% of cost schedule and performance goals met
	o increase customer outreach to OAMFA Grants community	Bev Manley						
	- plan							
	- implementation							
	- Grants Management Conference Customer Teambuilding Session			06/30/05	10/31/05			
	o implement the Case for Change for Grants	<del>Gary Johnson</del> Richard Franetzki		02/28/05		02/28/05		
	- develop strategic DOC grants re-engineering			TBD	FY 06			
	- identify risk managemnt techniques through the strategic plan			06/30/05		06/01/05		
	- develop and implement Automated Grants Process (ASAP)				On-going			
	o develop and implement Grants Balanced ScoreCard	Gary Johnson Richard Franetzki		09/30/05	04/30/06			

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
<b>Business Process</b>	<u><b>Develop Strategic Plan for Competitive Sourcing Program</b></u> <ul style="list-style-type: none"> <li>o inventory to OMB</li> <li>o complete Feasibility Studies – facilities and HR</li> <li>o manage overall DOC feasibility studies</li> <li>o revised plan targets to OMB</li> <li>o annual FAIR Act Report <ul style="list-style-type: none"> <li>- OMB</li> <li>- Congress</li> </ul> </li> <li>o link to Budget</li> <li>o link to HR (Six Step Process)</li> </ul>	Maile Arthur	CASD, CAS, CIO, OFM, OHRM, all DOC	06/30/05 07/31/05  09/30/05  12/31/05	06/30/05 08/31/05  10/31/05	06/30/05 08/31/05		% of cost schedule and performance goals met
<b>Human Capital/Policy</b>	<b>Implement the COR Program</b>	<del>Curtina Smith</del> Virna Evans	Customers, Acquisition Council, HC Team	09/30/05				% of cost schedule and performance goals met
<b>Human Capital/Policy</b>	Manage Integrated Acquisition Planning and Review Board Process <ul style="list-style-type: none"> <li>o manage Acquisition Review Board (ARB)</li> <li>o develop and implement guidance <ul style="list-style-type: none"> <li>- DAO</li> <li>- CAM Chapter</li> </ul> </li> </ul>	Greg Crider	OCIO,ASI-policy task, Acquisition Council, Budget, OGC, OHRM, OAS, OSY	On-going  06/30/05	09/30/05 11/01/05 11/01/05			
<b>Human Capital/Policy</b>	<b>Conduct Participate GOES-R review (Office of Budget has the lead)</b>	Greg Crider	OCIO, Budget, OGC,OHRM, OAS, OSY, ESA, Census	quarterly	On-going			



Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
<b>Business Process</b>	IAA/MOU Policy for OS <ul style="list-style-type: none"> <li>o implementation plan</li> <li>o implementation completed</li> <li>o tracking of OS MOUs</li> <li>o implement OS Interim Checklist</li> </ul>	Dan Alexander/ Donna Calacone	w/ Mary for Dept. Level	03/15/05 04/15/05 03/01/05 03/15/05		03/15/05 04/15/05 10/01/04 03/15/05		
	Implement commodity sourcing recommendations (SOFTWARE ACQUISITION) <ul style="list-style-type: none"> <li>o <i>initial analysis and plan</i></li> <li>o develop process</li> <li>o staff and implement one commodity team</li> </ul>	<del>Greg Crider</del> Barbara Fallat Curtina Smith	CIO, BAH, CAS, Acquisition Council	<i>09/30/05</i> 04/30/05 09/30/05	<del>ON HOLD</del>  FY 06		Acquisition Excellence: Provide leadership and promote effective quality control	
<b>Human Capital/Policy</b>	Integrate IT Security into Acquisition Process <ul style="list-style-type: none"> <li>o rollout training</li> <li>o implement OIG Action Plan</li> <li>o coordinate Acq Comm participation in annual compliance review</li> </ul>	<del>Curtina Smith</del> Dao Vissering Virna Evans	CIO, OIG, Acquisition Council, HC Team, Bureaus, OHRM	05/30/05 05/30/05 09/30/05	09/30/05	04/22/05		
<b>Business Process</b>	Develop Department-wide IAA/MOU Guidance <ul style="list-style-type: none"> <li>o IAA Task Force meetings</li> <li>o Questionnaires to IAA Community</li> <li>o Best Practices</li> <li>o Draft Manual</li> <li>o Final Manual</li> </ul>	Mary Mozingo	Task Force, CAS, OGC, Acquisition Council, Budget, Financial Management	Monthly 02/15/05 03/31/05 <del>05/15/05</del> 06/30/05	09/30/05	03/01/05 03/31/05		

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
Technology	<b>Analyze, standardize, and document, &amp; implement enterprise-wide acquisition data elements and business process</b>	Crystal Davis	Acquisition Council, CBE Users, CACI, Booz Allen Hamilton, CAS, CAPPS					Ratio of protests sustained by GAO and COFC
	o C.buy/C.requestion (contract administration /CSTARS/ORSI/FPDS-NG/COR module)	Crystal Davis		03/15/05	03/31/05	03/31/05		% of contract dollars for socio economic goals
	- Data Dictionary			04/30/05				% competitive procurement of total procurements
	- Bureau Specific Data			07/31/05				
	- Business Process							
	C-Buy and C-Requisition bureau specific data		10/07/05	04/30/05	05/02/05	(as a functional expert on CSTARS will interface w/ Business Process)		
	- Business Process	07/31/05						
o reporting EARS Build 2								
o IAA/MOU Module	Tom Cochran	07/31/05	ON HOLD					
o acquisition strategic planning vs SAM		04/30/05						

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
<b>Business Process/ Grants</b>	Improve DOC Grants Indirect Cost Audits Program  o develop improvement plan o finalize & implement plan o provide a monthly listing of indirect cost information to department Grants offices o evaluate the effectiveness of process	Beverly Manley/ <del>Gary Johnson</del> Richard Franetzki	DOC Grants Council,	04/30/05  on-going  on-going	09/30/05	04/30/05	Become an implementer of innovative and successful acquisition practices.	
<b>Human Capital/Policy (Grants)</b>	Update Grants Manual  o outline review processes o determine priorities o initiate DAO changes - DAO 213-5: Audit Resolution o <i>implement selected policy updates</i>	Gary Johnson	OGC, DOC Grants Council, Grant Specialists	03/31/05 04/30/05  06/30/05	<del>ON HOLD</del> <del>03/31/05</del> 09/30/05 10/31/05  TBD  On-going			
								% of total dollars for commercial items

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
<b>Technology</b>	DOC Implementation of IAE  Participate in meetings and develop and implement a strategy to communicate to acquisition community <ul style="list-style-type: none"> <li>o <del>IGT</del>—Suspended by GSA</li> <li>o eSRS</li> <li>o FPDS-NG</li> <li>o FBO</li> <li>o FedTeDS</li> </ul>	Crystal Davis   Mary Mozingo George Ralis Yancey Stern Greg Coss Greg Coss	CASD, Acquisition Council, CFO Council, CIO Council, CAMS Communications	Monthly				
<b>Technology</b>	<b>Implement Grants Automation</b> <ul style="list-style-type: none"> <li>o Grants.gov               <ul style="list-style-type: none"> <li>- MBDA applications posted</li> <li>- NOAA, NIST applications posted</li> <li>- EDA, ITA applications posted</li> </ul> </li> <li>o <b>NOAA Grants ONLINE</b> <ul style="list-style-type: none"> <li>- complete Grants business case</li> <li>- PE decision to go with system "live"</li> <li>- complete Enterprise System Requirements Definition</li> <li>- expand to other grants offices</li> </ul> </li> </ul>	Richard Franetzki         Greg Coss	Bus. Process Grants Communication, CASD	04/01/05 07/01/05 FY06 01/31/05 04/01/05 07/01/05 12/30/05	12/31/06	08/31/05 07/28/04 06/30/05	Become an implementer of innovative and successful acquisition practices.	# of actions using electronic commerce

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
Resource/ Financial Management	Address Internal Administrative Business Processes and Accountabilities <ul style="list-style-type: none"> <li>o issuance of SOPs on procedures</li> <li>o revamp personnel action system</li> <li>o implement budget tracking system</li> <li>o move to Consolidated Centralized Operations (Admin Team)</li> <li>o develop the secretarial pool for increase efficiency <ul style="list-style-type: none"> <li>- begin a rotation process</li> </ul> </li> </ul>	Maile Rasco - Arthur		On-going 11/01/04  03/31/05 10/31/05  12/15/04	09/15/05	      12/13/04		Employee and Management surveys
Business Process	Implement COMMITS NexGen <ul style="list-style-type: none"> <li>o award Master Contract</li> <li>o finalize fee structure</li> <li>o finalize Ordering Guide</li> <li>o implement IBOP (CECOM)</li> <li>o NexGen Kick-Off</li> <li>o complete COMMITS financial/management assessment</li> </ul>	Patti Stang  Patti Stang Dan Alexander Alex/Stang Crowley/Johnson (ASI) Alex/Stang T. O'Bryant	CAS, OGC, OFPP, OSDBU, OEB, Census NOAA, OCIO, CAPPS, NIST, ASI	01/14/05 02/15/05 02/28/05 03/31/05  04/05/05 04/15/05	     05/31/05	01/21/05 03/21/05 03/21/05 04/25/05  04/05/05		% of eligible dollars and actions for PBSC
Business Process	Enterprise-Wide Contracting <ul style="list-style-type: none"> <li>o develop approach</li> <li>o obtain approach approval</li> <li>o conduct market research</li> <li>o complete procurement</li> <li>o market results as best practice</li> </ul>	Dan Alexander/ Donna Calacone	CAPPS	  03/08/05 03/22/05 04/22/05 06/23/05 07/20/05	  07/17/05 08/24/05 10/01/05 11/01/05	   04/27/05		% of scheduled initiatives schedule and implemented

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
<b>Business Process</b>	<b>CAS Reorganization</b>		Sade, Arthur, CFO, OFM, OB, OAS, OHRM, ASI					
	o resource allocation approved by SPE	M.Anastasio		01/19/05		01/19/05		
	o resource allocation approved by CFO	Mike Sade		01/27/05				
	o begin space reconfiguration	T. O'Bryant		01/28/05		01/28/05		
	o coordinate with OB, OFM, OAS, OHRM	M. Anastasio		02/18/05	06/15/05	06/02/05		
	o waivers completed	Maile Arthur		03/11/05	06/15/05			
	o job announcement	OHRM		03/16/05	07/15/05			
	o selection completed	M. Anastasio		03/18/05	08/15/05			
	o finish space configuration	T. O'Bryant		03/29/05	07/22/05			
	o update DAO 208-XX	Donna Calacone		05/01/05	TBD			
	o report quarterly on cost to spend ratio	System Support		07/01/05		04/15/05		
	o report quarterly on employee and customer satisfaction	System Support		07/01/05	10/01/05			

## Learning Growth

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
<b>Technology</b>	<ul style="list-style-type: none"> <li>o Assess CBE Users Groups Training Program</li> </ul>	Crystal Davis	CASD, CAMS Support Center, CIO, CSTARS Users, CAMS Users	<del>07/30/05</del>	On-going		Learning and Growth: Increase availability and access to information for strategic Management and Acquisition. Decision Making	Extent of reliable management information
<b>Human Capital/Policy</b>	Implement Balanced ScoreCard tools and institutionalize program <ul style="list-style-type: none"> <li>o publish FY 04 results</li> <li>o validate/update FY 05 survey questions</li> <li>o establish targets for FY 05 and beyond</li> <li>o report - FY 05 1<sup>st</sup> and 2<sup>nd</sup> quarters results – not done</li> <li>o develop draft BSC program guide</li> <li>o report – FY 05 3rd quarter results – not done</li> <li>o report – FY 05 4<sup>th</sup> quarter results</li> <li>o analyze FY 05 data</li> <li>o FY 05 data on OAMFA website</li> </ul>	David Carter	CASD, Acquisition Council, HCOs, HC Team	01/31/05 03/01/05 03/31/05 04/30/05 05/30/05 07/31/05 <del>10/31/05</del> on-going 10/31/05	06/30/05 06/30/05 10/15/05	02/04/05		

Team	Initiative	Lead	Collaboration	Due Date	Revised Date	Date Completed	Goal/Objective	Measure
								% contractors in Business Partners network
Human Capital/Policy	<u><b>Develop and Implement Human Capital Plan</b></u> <ul style="list-style-type: none"> <li>o rollout database</li> <li>o conduct workforce assessment</li> <li>o standardize 1102, 1105, 1106 position descriptions</li> <li>o develop Acquisition Community HC plan</li> </ul>	<del>Curtina Smith</del> Virna Evans	Contract Support, CASD, Acquisition Council, HCOs, HC Team, OHRM	04/30/05 06/30/05 06/30/05 09/30/05	07/31/05 08/30/05 07/31/05			% Acquisition employees meeting education requirements as defined by Clinger-Cohen
Human Capital/Policy	DOC Acquisition/COR Conference	<del>Nancy Barrere</del> Virna Evans	Contract Support, Acquisition Council, HC Team COR, CIO Procurement	06/30/05	10/31/05			% acquisition employees meeting mandatory training requirements as defined by the agency. % employees satisfied with the professionalism, culture and values